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ABSTRACT

This summary contains excerpts from the California Business Education Program Guide for Office and Distributive Occupations (published in 1973 and supplemented with an accounting clerk program in 1975). It begins by outlining the purpose, rationale, and model of this program to provide students with (1) competencies common to both distributive and office occupations, (2) an office core and a distributive core of competencies, and (3) competencies for eight selected entry-level occupations: general office clerk; accounting clerk; clerk-typist; stenographer; salesperson, general; checker-cashier; service station attendant; and waiter-waitress. Other contents include the identification of the needed competencies and performance objectives to meet entry job requirements, sample pages of a competency module, suggestions for a step-by-step procedure to implement the program, explanation of a record-keeping system, model of an administrative system management plan, a system overview, and an article on personalized instruction (a Business Education Fact Sheet is included in the Business Education Management Manual). (YLB)

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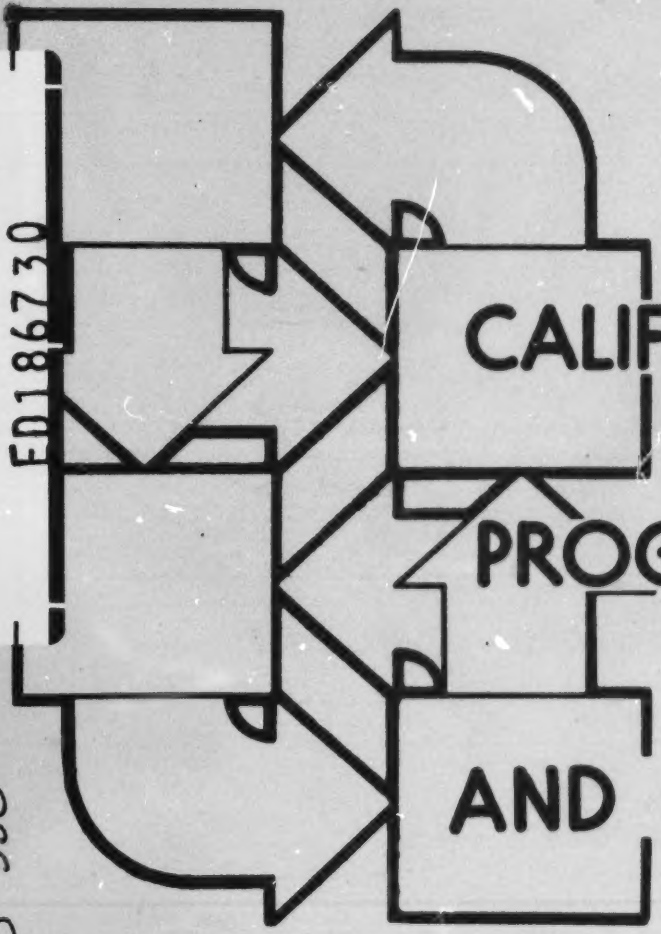

SUMMARY OF

CALIFORNIA BUSINESS EDUCATION

PROGRAM GUIDE FOR OFFICE

AND DISTRIBUTIVE OCCUPATIONS

CE025 353

developed by the bureau of business education · california state department of education · wilson riles, superintendent of public instruction · sacramento

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This Summary contains excerpts from the California Business Education Program Guide for Office and Distributive Occupations which was originally published by the Bureau of Business Education in 1973 and supplemented in 1975 by the addition of the accounting clerk program.

Included in the document are the following: the identification of needed competencies and performance objectives to meet entry job requirements, sample pages of a competency module, suggestions for a step-by-step procedure to implement the program, explanation of a record keeping system, models of an administrative system management plan, a system overview, and an article on personalized instruction (a Business Education Fact Sheet included in the Business Education Management Manual).

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CALIFORNIA BUSINESS EDUCATION PROGRAM GUIDE FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS

Purpose

To assist distributive and office education teachers of secondary and adult students in reappraising and updating the business education curriculum, the California State Department of Education, Bureau of Business Education, sponsored a Task Force which developed guidelines for a unified office and distributive education training program. To provide students with entry-level job competencies (skills, attitudes and knowledges) compatible with the needs of employers, the program was based upon identifiable competencies required for a cluster of distributive and office occupations rather than upon traditional courses. The system for managing the program was designed as a tool so that the transition from courses to competency-based instruction could be made with relative ease by teachers who work in a variety of school settings. The program includes student-oriented performance objectives and a number of optional approaches to instruction for the following:

1. Competencies common to both distributive and office occupations
2. An office core and a distributive core of competencies
3. Competencies for selected entry-level office and distributive occupations.

Tests and instructional checklists have been prepared for the competency modules.

Rationale

Seven occupations were selected for this study: General Office Clerk; Clerk-Typist; Stenographer; Salesperson, General; Checker-Cashier; Service Station Attendant; and Waiter-Waitress. These were chosen because they represented entry-level employment opportunities that are readily available to students completing office and distributive education programs. An investigation of task analysis studies determined those competencies needed by entry-level employees in the performance of their work. The need-to-know competencies included in this guide were based upon the following major studies:

Crawford, Lucy - A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education; (ED 032 382 -- ED 032 911) Virginia Polytechnic Institute and State University, Blacksburg, Virginia.

Davis, Gene and Smith, Art - Cooperative Occupational Survey -- Skills Identified with the Clerical and Sales Job Fields; Riverside, California.

Erickson, Lawrence W. - Basic Components of Office Work -- An Analysis of 300 Office Jobs; University of California, Los Angeles.

Ertell, Ken - Clusters of Tasks Performed by Merchandising Employees Working in Three Standard Classifications of Retail Establishments; (ED 023 911) University of Idaho, Moscow, Idaho.

Kallaus, Norman F. - Hiring Standards and Job Opportunities for Beginning Office Workers; University of Iowa, Iowa City, Iowa.

Perkins, Edward, etal - Clusters of Tasks Associated with the Performance of Major Types of Office Work; Washington State University, Pullman, Washington.

The USOE classifications from Vocational Education and Occupations, the Dictionary of Occupational Titles and the Occupational Outlook Handbook were used for job descriptions. Inquiries were addressed to all county and major city government employers in California as well as many large enterprises which had been involved in the measurement of office work. Studies by the Human Resources Research Organization, Xerox, and Standard Oil of California were among those used to assist in further establishing standards of performance in the office occupation clusters.

Procedures

Based upon this data, the Task Force prepared minimum performance objectives for a sequence within each of the competency modules determined as necessary for entry-level employment. Available educational resources were searched, including Educational Research Information Center and Business Education Data Dissemination System, in an attempt to identify instructional strategies that would develop requisite competencies.

Limitations

The Guide was limited by including only seven of the multitudinous occupations which fall within the office and distributive occupational clusters. In addition, technologies which cut across other vocational areas cannot be effectively taught in isolation (i.e., competencies for some jobs such as service station attendant need to be taught in conjunction with other disciplines which were not represented in this project). Educational expertise such as counseling and guidance, tests and measurements must also be applied to the program. This guide was concerned only with need-to-know entry-level skills, attitudes and knowledges; however, it is fully recognized that these competencies do not encompass a complete business education program. Lastly, no attempt was made to identify and list all of the possible objectives and strategies. This guide represents a statement which will need continual validation, revision and expansion.

Common Core Units in Business Education (CCUBE)

In the summer of 1977, Common Core Units in Business Education (CCUBE) instructional units were issued by the Bureau of Business Education. CCUBE, an innovative approach to competency-based instruction, includes instructional materials, methodologies, and strategies for implementing the 16 Common Core competencies of the California Business Education Program Guide for Office and Distributive Occupations. CCUBE is designed to facilitate and enhance personalized instruction. A statement regarding personalized instruction, included in this document, was disseminated statewide in the fall of 1976.

The complete CCUBE instructional package includes written materials (Student Manual, Working Papers, and Teacher Guide) for each of the 16 Common Core competencies, related media, and a Strategies Manual.

These materials are available upon request only to teachers who have attended a CCUBE inservice program. Written materials are distributed by the Bureau of Business Education, California State Department of Education, and media materials may be purchased from a private vendor. More information regarding availability of materials may be secured from Regional Supervisors of the Bureau of Business Education.

PROGRAM MODEL

The model was prepared to give an overview of the California Business Education Program for Office and Distributive Occupations. It shows that competencies common to both the distributive and office entry-level occupations have been identified. This concept is significant because it provides a foundation for job flexibility. The office core competencies are those which were identified as being common to the three selected office jobs: General Office Clerk; Clerk-Typist; and Stenographer. The distributive core competencies are those which were identified as being common to all four selected distributive jobs: Checker-Cashier; Salesperson, General, Service Station Attendant; and Waiter-Waitress. The model presents the concept that specialty competencies have been identified for each of the selected jobs in both the office and distributive components. No hierarchy was found in the distributive jobs, whereas the stenographer must obtain competence in the general office clerk and clerk-typist jobs, plus specialty competence for stenographer.

The Task Force recognized that individual guidance and preparation for the role of consumer are integral components of a total program; however, the constraints of this occupational study did not provide for the incorporation of these two vital aspects. Youth groups were noted for their importance to occupational training. Because it is imperative that individuals being trained for entry-level employment develop proper attitudes and know how to work with other people, human relations was flagged within the confines of the model to indicate the need for continuous attention to that subject area in addition to the suggestions in the study.

The accounting clerk program was issued in 1975 as a supplement to the California Business Education Program Guide for Office and Distributive Occupations. This summary identifies the competencies and the objectives included in the accounting clerk supplement as well as those contained in the original publication.

PROGRAM MODEL FOR OFFICE AND DISTRIBUTIVE OCCUPATIONS

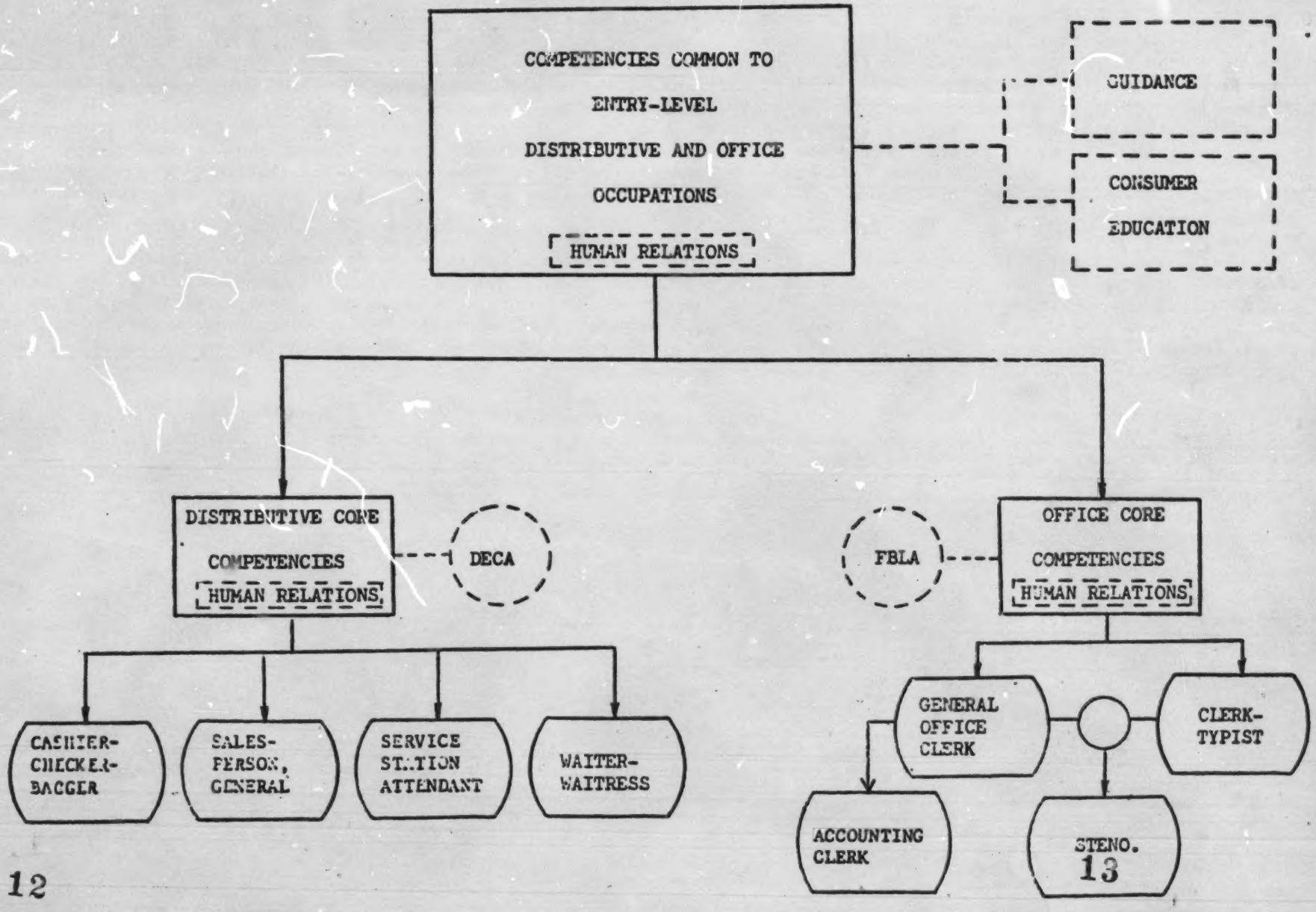


CHART OF COMPETENCY MODULES

100. Common Core
- 101. Adding Machine
- 102. Data Processing
- 103. Grooming
- 104. Handwriting
- 105. Instructions
- 106. Job Application
- 107. Making Change
- 108. Math Computations
- 109. Oral Communication
- 110. References, Manuals, Directories, Catalogs
- 111. Simple Business Records
- 112. Sorting, Checking, Verifying
- 113. Spelling
- 114. Telephone
- 115. Working with People
- 116. Written Communication

200. Office Core
- 201. Duplicating
- 202. Filing and Retrieving
- 203. Mail (Incoming and Outgoing)
- 204. Petty Cash
- 205. Spelling
- 206. Typing
- 207. Working with People
- 208. Written Communication

300. General Office Clerk
- 301. Adding Machine
- 302. Filing and Retrieving
- 303. Mail (Incoming and Outgoing)
- 304. References, Manuals, Directories, Catalogs
- 305. Simple Business Records
- 306. Telephone

400. Clerk-Typist
- 401. Spelling
- 402. Typing
- 403. Written Communication

500. Stenographer
- 501. Spelling
- 502. Typing and Transcribing
- 503. Written Communication

600. Accounting Clerk
- 601. Service Accounting
- 602. Cash Accounting
- 603. Payroll Accounting
- 604. Merchandise Accounting
- 605. Automated Accounting
- 606. Government Accounting
- 607. Machine Calculating

700. Additional Occupations

800. Distributive Core
- 801. Careers in Marketing
- 802. Marketing in Our Economy
- 803. Basic Sales Techniques
- 804. Cashiering (Cash Register and Sales Records)
- 805. Communication
- 806. Customer Services
- 807. Employer-Employee-Customer Relations
- 808. Sales Promotion
- 809. Stockkeeping and Inventory Control

Specialties
- 810. Advertising
- 811. Creative Selling
- 812. Display

900. Distributive Occupations
- 901. Cashier-Checker-Bagger
- 902. Salesperson, General
- 903. Service Station Attendant
- 904. Waiter-Waitress

NUMERICAL SYSTEM

A system has been devised to identify the components of the competency modules included in the program guide.

Following is an explanation of the numerical system:

Code			Identifies
		→	Program Level
000			
		→	Competency Module
	.01		Performance Objective
		.00	Objective Number
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials

Example:

		→	Common Core
101			
		→	Adding Machine
	.01		Performance Objectives
		01	Add, Subtract, Multiply
	.02		Instructional Ideas
	.03		Pretest
	.04		Posttest
	.05		Learning Activity Materials

NUMERICAL SYSTEM

100.00.00 COMMON CORE COMPETENCIES

101.00.00 ADDING MACHINE
- .01 Performance Objectives
  - .01 Add, Subtract, Multiply
  - .02 Sub and Grand Total
  - .03 Decimal Placement
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

102.00.00 DATA PROCESSING
- .01 Performance Objectives
  - .01 Terms
  - .02 Punched Card
  - .03 Printout
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

103.00.00 GROOMING
- .01 Performance Objectives
  - .01 Inventory
  - .02 Clothing Styles
  - .03 Stress Situation
  - .04 Regulations
  - .05 Dress
  - .06 Facial-Hair Style
  - .07 Grooming Plan
  - .08 Health Plan
  - .09 Complexion
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

104.00.00 HANDWRITING
- .01 Performance Objectives
  - .01 Legibility Factors
  - .02 Print and/or Cursive
  - .03 Business Forms
  - .04 Application Form
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

105.00.00 INSTRUCTIONS
- .01 Performance Objectives
  - .01 Identify Missing Elements
  - .02 True and False
  - .03 Record Numbers, Symbols
  - .04 Written Follow-up
  - .05 Oral Follow-up
  - .06 Remember and Repeat
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

106.00.00 JOB APPLICATION
- .01 Performance Objectives
  - .01 Vocabulary
  - .02 Social Security
  - .03 W-4 Form
  - .04 Employment Test
  - .05 Resume or Data Sheet
  - .06 Application Letter
  - .07 Application Forms
  - .08 Interview Questions
  - .09 Appointment, Telephone
  - .10 Simulate an Interview, Post-Interview Critique
  - .11 Follow-up Letters
  - .12 Payroll Voucher Terms
  - .13 Deductions
  - .14 Endorsement

100.00.00 COMMON CORE COMPETENCIES (continued)

106.00.00 JOB APPLICATION (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

107.00.00 MAKING CHANGE
- .01 Performance Objectives
  - .01 Set Up Cash Fund
  - .02 Handle Transaction
  - .03 Balance Cash
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

108.00.00 MATH COMPUTATIONS
- .01 Performance Objectives
  - .01 Add Whole Numbers
  - .02 Subtract Whole Numbers
  - .03 Multiply Whole Numbers
  - .04 Divide Whole Numbers
  - .05 Decimal Numbers
  - .06 Convert Common Fractions to Decimal Numbers
  - .07 Reduce Fractions to Lowest Terms
  - .08 Common Fractions
  - .09 Combinations of Whole, Decimal, Common Fraction
  - .10 Round-off Decimals to 1, 2, 3 Places
  - .11 Convert Fractions and Decimals
  - .12 Count and Record Information
  - .13 Read and Record Information from Table
  - .14 Convert Percent to Decimal, Decimal to Percent
  - .15 Multiply and Divide Basic Percentage Problems
  - .16 Measurements
  - .17 Weights

108.00.00 MATH COMPUTATIONS (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

109.00.00 ORAL COMMUNICATION
- .01 Performance Objectives
  - .01 Converse Spontaneously
  - .02 Recognize, Interpret, Recall, Ideas, Questions and Directions
  - .03 Answer and Ask Questions, Make Requests
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

110.00.00 REFERENCES, MANUALS, DIRECTORIES, CATALOGS
- .01 Performance Objectives
  - .01 Reference Questions
  - .02 Dictionary
  - .03 Abbreviations
  - .04 Telephone Directory
  - .05 Telephone Directory
  - .06 Telephone Directory
  - .07 City Directory
  - .08 City Directory
  - .09 Zip Code Directory
  - .10 Company Directory
  - .11 Employee Handbook
  - .12 Catalog
  - .13 California Road Map
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

100.00.00 COMMON CORE COMPETENCIES (continued)

111.00.00 SIMPLE BUSINESS RECORDS
- .01 Performance Objectives
  - .01 Telephone Messages
  - .02 Sales Receipts - Tally Sheet
  - .03 Bank Deposit Slip - Daily Cash Tally
  - .04 Inventory Control Sheet - Tally - Requisition Form
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

112.00.00 SORTING, CHECKING, VERIFYING
- .01 Performance Objectives
  - .01 Match and Sort by Number, Letter, Color
  - .02 Check and Compare Names
  - .03 Check and Compare Numbers
  - .04 Check and Compare Names, Numbers
  - .05 Copy in Specific Order
  - .06 Sort Alphabetically
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

113.00.00 SPELLING
- .01 Performance Objectives
  - .01 Commonly Used Words by Rules, by Error Patterns, Proofread for Errors
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

114.00.00 TELEPHONE
- .01 Performance Objectives
  - .01 Respond Spontaneously
  - .02 Answer Incoming Calls
  - .03 Place Outgoing Calls
  - .04 Pushbutton Phone Calls
  - .05 Pushbutton Phone Calls
  - .06 Incoming Long Distance Calls
  - .07 Outgoing Long Distance Calls
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

115.00.00 WORKING WITH PEOPLE
- .01 Performance Objectives
  - .01 Problem-Solving Distress Situations
  - .02 Identify and Rate Strengths and Weaknesses
  - .03 Improvement Plan
  - .04 Follow-up Rating
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

116.00.00 WRITTEN COMMUNICATION
- .01 Performance Objectives
  - .01 Incomplete Sentences
  - .02 Complete Sentences
  - .03 Incorrect Word Usage
  - .04 Punctuation
  - .05 Capitalization
  - .06 Composition
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

200.00.00 OFFICE CORE COMPETENCIES

201.00.00 DUPLICATING
- .01 Performance Objectives
  - .01 Fluid Duplicator
  - .02 Offset Printer
  - .03 Photocopier
  - .04 Mimeograph Machine
  - .05 Thermal Copier
  - .06 Paper Cutter
  - .07 Paper Punch
  - .08 Collate and Staple
  - .09 Loading Stapler
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

202.00.00 FILING AND RETRIEVING
- .01 Performance Objectives
  - .01 Arrange by Alphabet, Numbers
  - .02 File Alphabetically
  - .03 Retrieve, Checkout and Record
  - .04 File Numerically
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

203.00.00 MAIL - PROCESS
- .01 Performance Objectives
  - .01 Incoming Mail
  - .02 Outgoing Mail
  - .03 Interoffice Mail
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

204.00.00 PETTY CASH
- .01 Performance Objectives
  - .01 Establish, Maintain and Replenish
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

205.00.00 SPELLING
- .01 Performance Objectives
  - .01 Commonly Used Business Words by Error Patterns
  - .02 Recognition of Misspellings
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

206.00.00 TYPING
- .01 Performance Objectives
  - .01 Touch Type - 40/8 Errors
  - .02 Machine Control
  - .03 Locate, Mark Errors
  - .04 Correction Aids
  - .05 Rough Draft
  - .06 Divide Words
  - .07 Carbon Copies
  - .08 Work Station Care
  - .09 Cards
  - .10 Labels
  - .11 Letters
  - .12 Envelopes
  - .13 Memos
  - .14 Fold and Insert Documents
  - .15 Manuscript
  - .16 Forms
  - .17 Duplicator Masterset
  - .18 Thermal Copy Preparation
  - .19 Photocopy Preparation

NUMERICAL SYSTEM (continued)

200.00.00 OFFICE CORE COMPETENCIES (continued)

206.00.00 TYPING (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

207.00.00 WORKING WITH PEOPLE
- .01 Performance Objectives
  - ..01 Employer/Employee
  - .02 Employee/Public
  - .03 Employee/Subordinate
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

208.00.00 WRITTEN COMMUNICATION
- .01 Performance Objectives
  - .01 Paragraphing
  - .02 Punctuation
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

300.00.00 GENERAL OFFICE CLERK COMPETENCIES

301.00.00 ADDING MACHINE
- .01 Performance Objectives
  - .01 Add, Subtract, Multiply
  - .02 Credit Balance
  - .03 Fractions to Decimals
  - .04 Multiply Decimals
  - .05 Percent
  - .06 Combination

301.00.00 ADDING MACHINE (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

302.00.00 FILING AND RETRIEVING
- .01 Performance Objectives
  - .01 Alphabetic
  - .02 Numeric
  - .03 Subject
  - .04 Geographic
  - .05 Follow-up Action
  - .06 Retrieve Folders
  - .07 Code Documents
  - .08 Cross-Reference
  - .09 Prepare Folders
  - .10 Reproduce Copies
  - .11 Checkout
  - .12 Abstract Information
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

303.00.00 MAIL
- .01 Performance Objectives
  - .01 Domestic
  - .02 Parcel Post
  - .03 Fourth Class
  - .04 Package - Prepare
  - .05 Special Handling
  - .06 International Mail
  - .07 Incoming
  - .08 Outgoing
  - .09 Interoffice
  - .10 Envelopes
  - .11 Mail List

NUMERICAL SYSTEM (continued)

300.00.00 GENERAL OFFICE CLERK COMPETENCIES (continued)

303.00.00 MAIL (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

304.00.00 REFERENCES, MANUALS, DIRECTORIES, CATALOGS
- .01 Performance Objectives
  - .01 Handbook
  - .02 Almanac
  - .03 Hotel-Motel Directory
  - .04 Thesaurus
  - .05 Atlas
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

305.00.00 SIMPLE BUSINESS RECORDS
- .01 Performance Objectives
  - .01 Bank Deposit
  - .02 Sales Slip
  - .03 Time Cards
  - .04 Stock Records - Incoming
  - .05 Stock Records - Outgoing
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

306.00.00 TELEPHONE
- .01 Performance Objectives
  - .01 Switchboard/Call Director Operation
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

400.00.00 CLERK TYPIST COMPETENCIES

401.00.00 SPELLING
- .01 Performance Objectives
  - .01 Common Business Words by Error Patterns
  - .02 Recognition of Misspellings
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

402.00.00 TYPING
- .01 Performance Objectives
  - .01 Touch Type - 40/8 Errors
  - .02 Transcribe Rough Draft from Machine
  - .03 Error Corrections
  - .04 Letter
  - .05 Transcribe Letter
  - .06 Compose Response Letter
  - .07 Outline
  - .08 Manuscript
  - .09 Minutes of Meeting
  - .10 Handwritten Tabulations
  - .11 Organize Tabulated Data by Columns, Form
  - .12 Financial Statement
  - .13 Mimeograph, Stencil
  - .14 Offset Master
  - .15 Duplicating Master Set
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

403.00.00 WRITTEN COMMUNICATION
- .01 Performance Objectives
  - .01 Composition
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

500.00.00 STENOGRAPHER COMPETENCIES

501.00.00 SPELLING
- .01 Performance Objectives
  - .01 Business Words by Error Pattern
  - .02 Proofread for Errors
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

502.00.00 TYPING
- .01 Performance Objectives
  - .01 Touch Type - 50/8 Errors
  - .02 Rough Draft from Dictation Notes
  - .03 Rough Draft from Transcribing Machine
  - .04 Transmittable Letter from Dictation Notes
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

503.00.00 WRITTEN COMMUNICATION
- .01 Performance Objectives
  - .01 Definitions
  - .02 Word Usage
  - .03 Five C's
  - .04 Editing
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

600.00.00 ACCOUNTING CLERK COMPETENCIES

601.00.00 SERVICE ACCOUNTING
- .01 Performance Objectives
  - .01 Source Document Analysis
  - .02 Cash Disbursement
  - .03 Journal Entries for Cash Transactions
  - .04 Posting
  - .05 Trial Balance
  - .06 Error Correction
  - .07 Pegboard--Professional System (Accounts Receivable
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

602.00.00 CASH ACCOUNTING
- .01 Performance Objectives
  - .01 Checkstub Record
  - .02 Bank Reconciliation
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

603.00.00 PAYROLL ACCOUNTING
- .01 Performance Objectives
  - .01 Summary Sheet of Authorized and Unauthorized Time
  - .02 Payroll Register
  - .03 Employees Earnings Record
  - .04 Payroll Taxes
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

604.00.00 MERCHANDISE ACCOUNTING
- .01 Performance Objectives
  - .01 Source Documents--Verifying and Coding
  - .02 Invoicing
  - .03 Journal Entries for Merchandise Transactions
  - .04 Sub-Ledger Posting
  - .05 Controlling Accounts (Receivable and Payable)
  - .06 Aging Report
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

605.00.00 AUTOMATED ACCOUNTING
- .01 Performance Objectives
  - .01 Machine Posting
  - .02 Computer Terminal
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

606.00.00 GOVERNMENT ACCOUNTING
- .01 Performance Objectives
  - .01 Claims Schedules and Remittance Advices
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

607.00.00 MACHINE CALCULATING
- .01 Performance Objectives
  - .01 Machine Operation--Addition
  - .02 Machine Operation--Multiplication, Division, Accumulation, Fractions, Percents
  - .03 Extensions
  - .04 Cash Discounts
  - .05 Depreciation
  - .06 Merchandise Inventory Costing
  - .07 Production Costing
- .02 Instructional Ideas
- .03 Pretest
- .04 Post-test
- .05 Learning Activity Materials

800.00.00 DISTRIBUTIVE CORE COMPETENCIES

801.00.00 CAREERS IN MARKETING
- .01 Performance Objectives
  - .01 Select Career Area
  - .02 Career Requirements
  - .03 Entry Job Requirements
  - .04 Competency Evaluation
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

802.00.00 MARKETING IN OUR ECONOMY
- .01 Performance Objectives
  - .01 Price Change Factors
  - .02 Economic/Marketing Trends
  - .03 Channels of Distribution
  - .04 Price-Weight Comparison
  - .05 Business Organizations
  - .06 Marketing System
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

803.00.00 BASIC SALES TECHNIQUES
- .01 Performance Objectives
  - .01 Approaches
  - .02 Buying Motives
  - .03 Substitution Selling
  - .04 Product Features
  - .05 Customer Benefits
  - .06 Demonstration
  - .07 Objections
  - .08 Closings
  - .09 Suggestion Selling
  - .10 Customer Assurance
  - .11 Sales Demonstration

NUMERICAL SYSTEM (continued)

800.00.00 DISTRIBUTIVE CORE COMPETENCIES (continued)

803.00.00 BASIC SALES TECHNIQUES (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

804.00.00 CASHIERING (CASH REGISTER & SALES RECORDS)
- .01 Performance Objectives
  - .01 Set Up Till
  - .02 Change Making Steps
  - .03 Cash Register Techniques
  - .04 Qualifying Tests
  - .05 Check Cashing
  - .06 Parts of a Salescheck
  - .07 Completing Saleschecks
  - .08 Charge Card Transactions
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

805.00.00 COMMUNICATION
- .01 Performance Objectives
  - .01 Oral Report
  - .02 Business Language
  - .03 Telephone Techniques
  - .04 Merchandise Description
  - .05 Listening Techniques
  - .06 Instructing Others
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

806.00.00 CUSTOMER SERVICES
- .01 Performance Objectives
  - .01 Cost-Profit Picture
  - .02 Check Authorization
  - .03 Customer Complaints
  - .04 Operational Problems
  - .05 Delivery Services
  - .06 Returns and Exchanges
  - .07 Service Desk Activities
  - .08 Credit Applications
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

807.00.00 EMPLOYER-EMPLOYEE-CUSTOMER RELATIONS
- .01 Performance Objectives
  - .01 Benefits of Good Customer Relations
  - .02 Salesperson Attitudes
  - .03 Dress Standards
  - .04 Solving Customer Problems
  - .05 Customer Relations Principles
  - .06 Demonstrating Attitudes
  - .07 Good Work Habits
  - .08 Co-worker Relations
  - .09 Supervisor Relations
  - .10 Solving Work Problems
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

800.00.00 DISTRIBUTIVE CORE COMPETENCIES (continued)

808.00.00 SALES PROMOTION
- .01 Performance Objectives
  - .01 Media
  - .02 Promotional Activities
  - .03 Types
  - .04 Kinds of Sales
  - .05 Salesperson's Responsibilities
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

809.00.00 STOCKKEEPING & INVENTORY CONTROL
- .01 Performance Objectives
  - .01 Inventory Shortages
  - .02 Stockkeeping Practices
  - .03 Safety Rules
  - .04 Inventory Control Reasons
  - .05 Physical Inventory
  - .06 Inventory Data
  - .07 Perpetual Inventory
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

810.00.00 ADVERTISING
- .01 Performance Objectives
  - .01 Comparative Media
  - .02 Objectives
  - .03 Basic Psychological Wants
  - .04 Secondary Wants
  - .05 Headlines
  - .06 Body Copy
  - .07 Illustrations
  - .08 Logotypes
  - .09 White Space
  - .10 Borders
  - .11 Ad Writing and Layout

810.00.00 ADVERTISING (continued)
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

811.00.00 CREATIVE SELLING
- .01 Performance Objectives
  - .01 Basic Techniques Review
  - .02 Customer Needs
  - .03 Customer Types
  - .04 Buying Decisions
  - .05 Buying Signals
  - .06 Merchandise Questions
  - .07 Agreement Sentences
  - .08 Overcoming Objections
  - .09 Sales Attitude
  - .10 Selling Demonstration
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

812.00.00 DISPLAY
- .01 Performance Objectives
  - .01 Display Objectives
  - .02 Survey
  - .03 Color
  - .04 Design
  - .05 Types of Displays
  - .06 Building a Display
- .07 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

NUMERICAL SYSTEM (continued)

900.00.00 DISTRIBUTIVE OCCUPATIONS COMPETENCIES

901.00.00 CHECKER-CASHIER-BAGGER

- .01 Performance Objectives
  - .01 Work Procedures
  - .02 Taxable Items
  - .03 Store Layout
  - .04 Price Marking
  - .05 Bagging
  - .06 Pricing Produce
  - .07 Grocery Checking
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

902.00.00 SALESPERSON, GENERAL

- .01 Performance Objectives
  - .01 Work Procedures
  - .02 Closing Procedure
  - .03 Layaway
  - .04 C.O.D.
  - .05 Interpreting Labels
  - .06 Estimating Sizes
  - .07 Wrapping
  - .08 Delivery Dating
  - .09 Unit Control Records
  - .10 Checking and Sizing Price Tags
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

903.00.00 SERVICE STATION ATTENDANT

- .01 Performance Objectives
  - .01 Work Procedures
  - .02 Customer Impressions
  - .03 Sales Procedures
  - .04 Under the Hood Service
  - .05 Windshield Service
  - .06 Tire Service
  - .07 Credit Card Procedures
  - .08 Last Impressions
  - .09 Extra Services
  - .10 Job Safety
  - .11 Service Station Application
  - .12 Sales Demonstration
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

904.00.00 WAITER-WAITRESS

- .01 Performance Objectives
  - .01 Work Procedures
  - .02 Reasons for Good Service
  - .03 Food Handling Skills
  - .04 Food Merchandising Techniques
  - .05 Service Attitudes
  - .06 Restaurant Terms
  - .07 Operating Requirements
- .02 Instructional Ideas
- .03 Pretest
- .04 Posttest
- .05 Learning Activity Materials

Sample Objectives

COMMON CORE | MAKING CHANGE | COMPETENCY 107

Number	Condition	Performance	Standard
107.01.01	Given a cash box, a change fund, and a cash report form	the student will count the cash by denomination and complete a cash report form	with 100% accuracy
107.01.02	Given a change fund and descriptions of cash transactions	the student will give change for each transaction	with 100% accuracy
107.01.03	Given the conditions described in the two objectives above and a proof of cash form	the student will fill out the proof of cash form, balancing the total cash received with the cash box total	with no overage or shortage

Number	Instructional Ideas	Notes
107.02.01	Locate play money, both currency and coins, for change handling practice. Most teachers find that the responsibilities for safeguarding and providing cash each class period is too great.	
107.02.02	A suggested time standard for this competency is the successful completion of 4 transactions in a minute. Demonstrate how to crumple new bills so that two bills are not given to a customer in error. Emphasize placing tendered money on the change place until the transaction is completed. Emphasize the importance of calling out the change returned to a customer.	
107.02.03	Develop mockups or overhead transparencies of various forms for proof of cash.	
General:	A. Contact a bank representative or a member of the police force who has expertise and have him demonstrate marked bills or counterfeit money. They can also tell of the change bluffers who confuse or distract cash handlers. B. Provide resource people who can explain the importance of company policy regarding: 1. dishonesty 2. falsification of records 3. carelessness in handling money (excessive and consistent overages or shortages of money) 4. failure to record a transaction or to issue a receipt 5. unauthorized borrowing or lending of company funds C. School cafeterias and snackbars have personnel who can demonstrate before the class or to small groups how to sort money with a mechanical sorter, wrap, count, and complete a daily cash summary.	

Note to Teacher: None

Materials Needed:

1. Change
2. Cash box
3. Cash report form
4. Items to purchase
5. Sales book (cash receipt book) or cash register (if possible)

1. Given a change fund, a cash box, a cash report form, you will count the cash by denomination and complete a cash report form as shown below:

CASH REPORT FORM

	Number	Amount
Pennies		
Nickels		
Dimes		
Quarters		
Half Dollars		
Silver Dollars		
Paper Money		
Checks		
Total		

2. One student will purchase items from another student for cash using a till. The student will complete the transaction on a cash register, if available, and give change. If cash register is not used, write out a receipt.

3. You are to complete a cash report form for the following transactions for the day:

Received the following cash through sales:

$15.31
3.00
5.29
.16
13.95
1.19
.79
6.29
.29
.89
Total Sales

The cash register readings at the beginning of the day was $00.00. There was $50.00 in change and bills placed in the cash drawer at the start of the day. The cash register reading at the end of the day was $97.17. Prepare a daily cash report.

3. (continued)

HANSON'S STORE

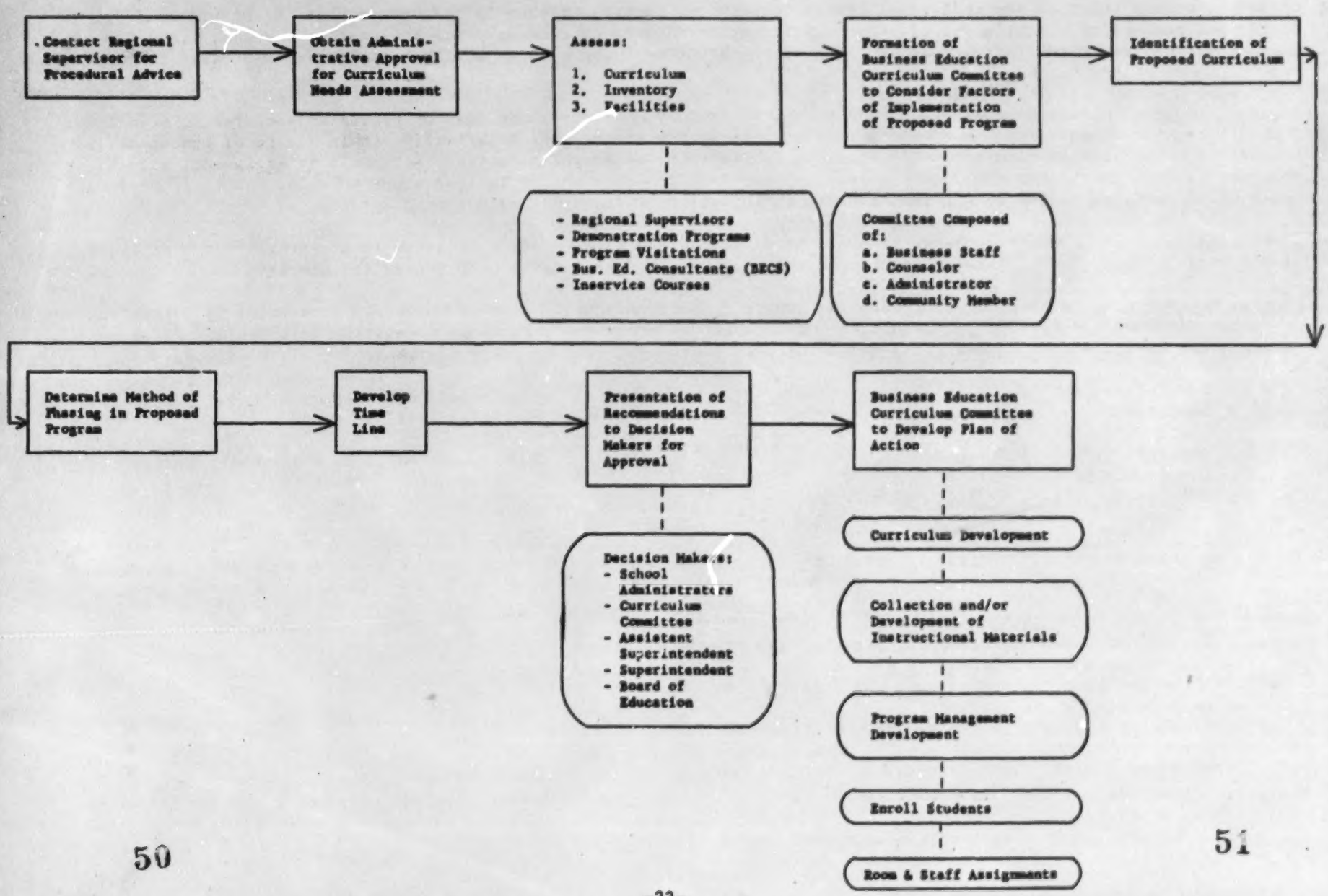
CASH REGISTER REPORT

MONEY IN DRAWER	AMOUNT	
Pennies		
Nickels		
Dimes		
Quarters		
Half Dollars		
Silver Dollars		
Paper Money		
Checks		
TOTAL 1. CASH IN DRAWER		
ADD TOTAL PAID OUT SLIPS		
TOTAL 2. TOTAL CASH RECEIVED		
REGISTER READINGS*		
*TOTAL 3. GROUP TOTAL (total Cash)		
*TOTAL 4. RECEIVED ON ACCOUNT		
TOTAL 5. CASH SALES (Total 3 minus Total 4)		
*TOTAL 6. CHARGE SALES		
TOTAL 7. TOTAL SALES (Total 5 plus Total 6)		
*TOTAL 8. PAID OUTS		
DEPARTMENT READINGS		
*DEPT I. GROCERIES		
*DEPT II. MEATS		
*DEPTIII. PRODUCE		
TOTAL SALES		
COMPUTATION OF CASH SHORT OR OVER		
TOTAL 3		
TOTAL 2		
CASH SHORT OR OVER		

Signed _____ Date _____

*These figures obtained from detailed audit slips.

STEP-BY-STEP PROCEDURE FOR IMPLEMENTATION



RECORD KEEPING SYSTEM

Records. At the heart of any individualized and continuous progress system is the method used for record keeping. Proper maintenance of a simple set of student information records is necessary for at least four years, since the student may desire to complete a competency at some other time. The records may be kept longer as a basis for employment recommendations.

Student Progress. Students will need to be monitored as they complete individual or groups of performance objectives. A master record is necessary. A student will not necessarily progress systematically within a core of competencies because of variations in each student's ability; availability of learning activity materials or equipment; illness or absence; as well as an open entry-exit policy. Students may also transfer in from other schools; and their previous training may overlap two or more cores, yet the individual core training may not be complete.

Clerical Assistance. The maintenance of up-to-date record keeping of student progress is an integral part of individual programming. The additional record keeping requires that assistance be provided for the teacher.

Program Monitoring. In addition to records of progress, keep records of student which may be helpful in counseling student. Since the employment opportunities for high school graduates vary among areas, the information needed on students may be different; however, the following points are suggested as being desirable for all students:

1. Name of student
2. Grade level
3. Vocational goal
4. Competency units in progress
5. Competency units completed
6. Work record (paid, unpaid, volunteer)
7. Certificates issued
8. Skill level attained
9. References
10. Evaluation of personal characteristics
11. Instructors' comments
12. Follow-up record

Teachers must be able to maintain initial records easily, accurately, and within minimal time limits. They must also be able to transfer initial records to permanent ones just as easily. A system can be designed that will effectively combine a minimum of time, effort, and cost. Record keeping must not become the nemesis of managing the program.

Some of the qualities which are desirable for such records follow:

1. Easily understood by students, parents, counselors, and teachers
2. Relate student achievement to ability
3. Allow for continuous diagnosis and prescription
4. Easy to record information
5. Glance at a single record and know what has occurred to date
6. Identify all students who need to work on a specific objective
7. Show the student what progress has been made toward entry-level employment skills

Several options are available to accomplish the goal of a useful record keeping system. A student card or folder is one option. Another is the adaptation of a commercial data retrieving system. A school may develop its own system which could be computerized if time and equipment were available.

CERTIFICATION OF STUDENTS

Certifying the occupations of general office clerk, clerk-typist, stenographer, checker-cashier, salesperson--general, service station attendant, and waiter-waitress encourages and develops a goal-oriented incentive for the student entering the program. From the employer's point of view, certification establishes the job proficiency of a prospective employee at the time of issuance.

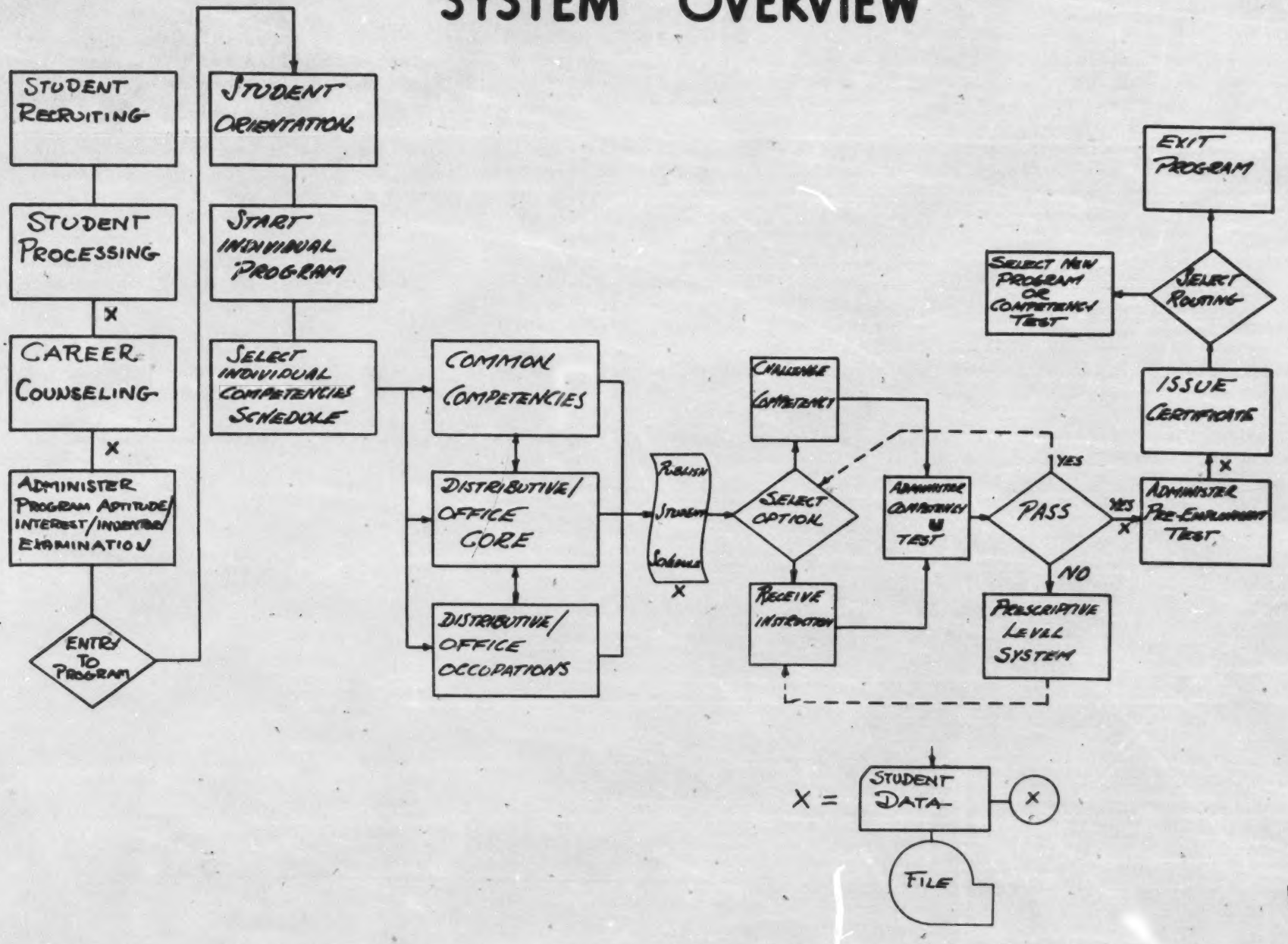
Certificates for these occupations should be issued only to students who have completed all of the competencies for that occupation. If performance less than this is accepted, the certificate loses its value in the eyes of the student as well as the employer. It is also suggested that certificates be stamped with the school seal and distributed at an awards assembly, or with diplomas to add to the prestige associated with receiving one.

Some students will not be able to meet all competencies leading to the completion of the seven occupations included in the program guide. Teachers may want to certify these students for other occupations, such as messenger, calculating machine operator, file clerk, telephone operator, receptionist, bookkeeper, shipping clerk, and sign press operator.

Before establishing a certificate for occupations not included in this guide, the teacher should obtain information on job requirements and job descriptions as a basis for writing additional objectives and competencies needed.

Remember: The certificate must be certification of student skills, not an identification of business courses he has completed. Sample certificates follow.

SYSTEM OVERVIEW



Bureau of Business Education
1-73

PERSONALIZED INSTRUCTION

What is personalized instruction?

In the traditional classroom, students are expected to pace their learning according to the teacher's schedule of presentation. The pace of instruction chosen by the teacher may be too slow and prove no challenge whatsoever to some students; while to others, it may be too fast and prove frustrating, even impossible.

This unfortunate situation occurs because all learning is a personal, individualized experience for the learner. Instruction may be given to groups of students, but all students learn as individuals. To explain, each person's readiness for, and style of, learning is governed by factors peculiar to himself--factors such as motivation, aptitudes, abilities and background. Only readiness for learning dictates the pace at which an individual can progress in a course of study. And his style of learning will determine the type of educational experience which will enable him to "receive" the instruction offered.

To meet the needs of students, teachers are moving to personalized instruction. Personalized instruction is defined as a teaching strategy that (a) permits students to progress at their own learning rate, and (b) includes one or more of the following elements:

- Individually prescribed learning activities based upon pretesting or precounseling.
- Periodic progress checks and evaluation, after relatively small units of learning, performed either by the student, the teacher and the student or groups of students and based on identifiable performance goals.
- Presentation of subject matter by means of hardware and/or software systems utilizing innovative materials and techniques such as unipacs, learning activity packets, content packages, written programmed modules, task simulation projects, integrated exercises, film loops, tape cassettes, motion picture films, slides, video tapes, group sessions, field trips, community classroom and individual projects, etc.

What is the teacher's role in personalizing instruction?

Personalized instruction is education custom tailored to fit a specific learner. It is a means of achieving learning successfully, economically, and predictably. It does not mean that each student must work individually and it does not have to be different for each student!! It just has to be appropriate for each learner! Personalized instruction is based upon the premise that there is no one "best" way for all people to learn and that there are, instead, alternatives for learning. These alternatives may or may not be different from those of another learner and they may even differ from the same learner according to the objectives to be accomplished. Personalized instruction is characterized by four distinct steps. Climb them to a higher level of learning in all of your classes!

- Diagnosing

  Diagnosing is determining where the student is in his learning pattern and what needs to be learned to complete his mastery of the established objectives. In personalized instruction the major function of the teacher becomes that of diagnosing what is to be learned and determining how far up the ladder each student will begin his/her learning experiences.

- Prescribing

  Prescribing what the learner will do to accomplish the learning task and determining what the teacher must do in order to make the student's learning more efficient and more predictably successful is the second step. This step, in the personalizing process requires great interaction between learner and teacher. Education is what happens to the person who learns. Instruction (or teaching) is what happens between the learner and the teacher. Personalized instruction strengthens and, in fact, depends upon building a one-to-one, eye-to-eye relationship between teacher and learner.

- Instruction

  Instruction is that interaction between the student and the teacher which enables the student to achieve his objectives. The instructional program must be such as to motivate the student to reach the established objectives.

- Evaluation

  The instructor must evaluate whether the student has achieved the objectives set. If the student was involved in setting the objectives, evaluation would be the student's determination of whether he achieved the objectives he set. If the student did not reach the objectives, the instructor would repeat the process and diagnose what the student failed to master, prescribe a new program, instruct the student, and then evaluate whether the student reached his objectives this time.